

CLOSURES

In this section, you will

CLOSE SERVICES

CLOSE A PLAN

CLOSE PROGRAMS

ENTER PARTICIPANTS IN FOLLOW-UP

Employment Plan Screen

Closure Tab

There are three areas that you can close when you are completed with your services for a participant.

1. Services
2. Plan
3. Program

You close services, plans, and programs on the **Closure Tab** on the "Employment Plan" Screen.

Closing Services:

MontanaWORKS {Test} - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - ARTHUR FONZERELLI(999-06-3243) Plan 1 of 2 | Carol Evanger (406)542-5763

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Services

☐ Show Closed Services

Service	Start	End	Outcome	Closure Comments
Formal Assessment	07/06/07			
GED/HS Diploma	07/06/07			
Transportation	07/06/07			

Employment Plan

Start End

Date Date Reason Plan Close Comments

07/06/07

Enrollments

☐ Show Closed Enrollments

Program	Start	End	Outcome	Comments
WMA, Adult	07/05/07			
WMA, Adult Follow Up	07/06/07			

File Location Archive Comments

Save Cancel

Date service completed

Record: 1/3

<ESC>

Normally, this screen will only show services that are still open. Notice the "Show Closed Services" checkbox. If you check this, the screen will display all services even if they are closed.

To close the services, you double click in the End date field and put in the date and **SAVE**.

Employment Plan Screen

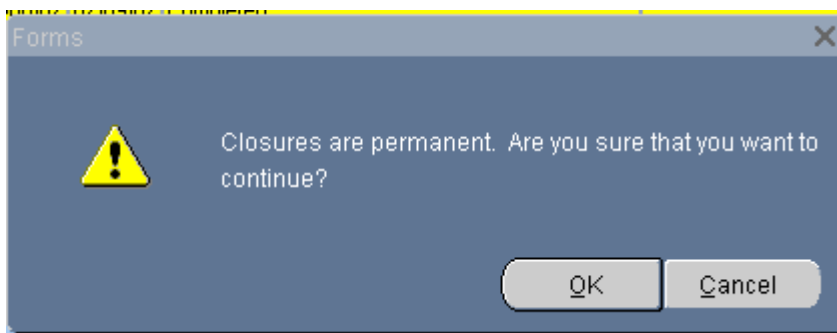
Closure Tab

After you put in an end date, you must also complete the Outcome field. Double click in the Outcome field and choose the appropriate outcome for the service.

You can also put comments for each service.

SAVE when you are completed.

You will get this message.



Employment Plan Screen

Closure Tab

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - RALPHY Z MALPHY(999-06-2746) Plan 1 of 1 | Joe Strelnik (406)494-0329

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Services ☒ Show Closed Services

Service	Start	End	Outcome	Closure Comments
Eligibility	06/27/07	07/09/07	Completed	
Employment/Labor Market Info	06/27/07	07/09/07	Completed	
Individual Employment Plan Dev	06/27/07	07/09/07	Completed	
Initial Assessment	07/05/07	07/09/07	Completed	
Training-Related Materials/Sup	07/05/07	07/09/07	Completed	

Employment Plan
Start End
Date Date Reason Plan Close Comments
06/27/07 07/09/07 EMPLOYMENT

Enrollments ☐ Show Closed Enrollments

Program	Start	End	Outcome	Comments
WMA, Dislocated Worker	06/27/07			

File Location Archive Comments

Save Cancel

Date service completed
Record: 1/5 <OSC>

Individual services may be closed from the Employment Plan when that service/activity is finished. The system will not allow you to “backdate” a closure!

Employment Plan Screen Closure Tab

Close Plan:

The next step in closing a participant out of services is to close the Plan.

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - MARCUS R SIMONSON(999-06-1448) | Suzanne Ferguson (406)444-4513

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Services

☐ Show Closed Services

Service	Start	End	Outcome	Closure Comments
Assessment Comprehensive	05/10/07			
Childcare	07/09/07			
Eligibility	05/10/07			
ITA Tuition	05/17/07			
Individual Employment Plan Dev	05/10/07			
Initial Assessment	05/10/07			

Employment Plan

Start End

Date Date Reason Plan Close Comments

05/10/07

Enrollments

☐ Show Closed Enrollments

Program	Start	End	Outcome	Comments
WIA Dislocated Worker	05/10/07			
WIA Adult	05/10/07			

File Location Archive Comments

Save Cancel

Date service completed

Record: 1/? <OSC>

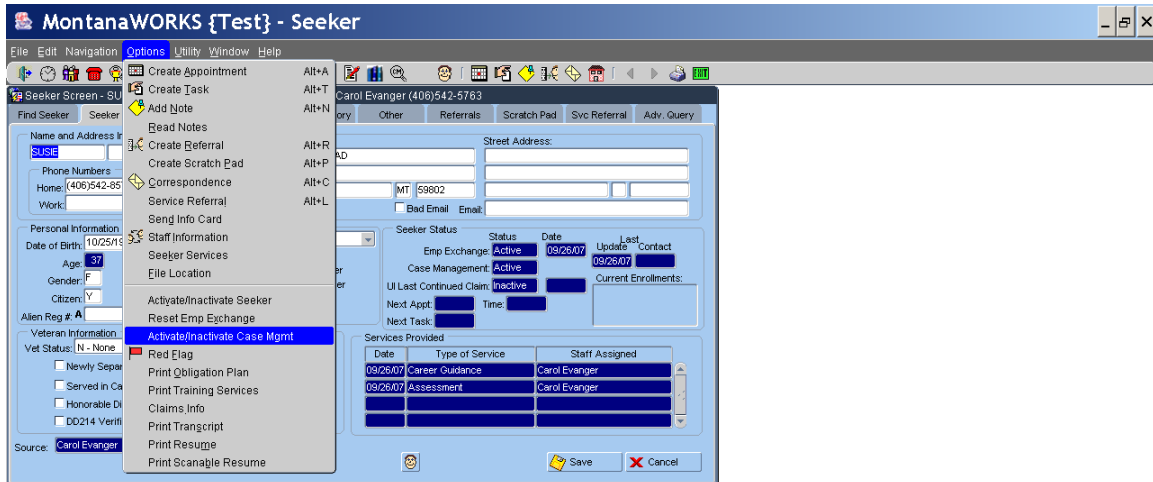
Click in the "End Date" field and select a date and outcome just like closing a service.

SAVE when you are done.

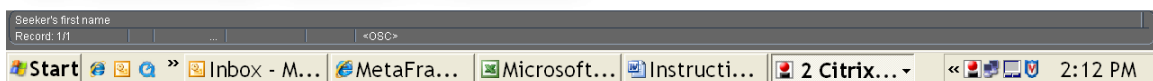
You can put comments in the "Comments" field if you wish.

IF YOU GET A MESSAGE AT ANY TIME THAT ASKS:
"DO YOU WANT TO INACTIVATE CASE MANAGEMENT?"
AND YOUR CHOICES ARE:
OKAY OR CANCEL
CHOOSE CANCEL!!!

Your seeker will need to be active in Case Management in order to enroll them into the follow-up program. If you accidentally inactivate their case management status, you will have to manually activate them.



OracleAS
Forms Services



To manually activate a seeker, navigate to the Seeker Screen.

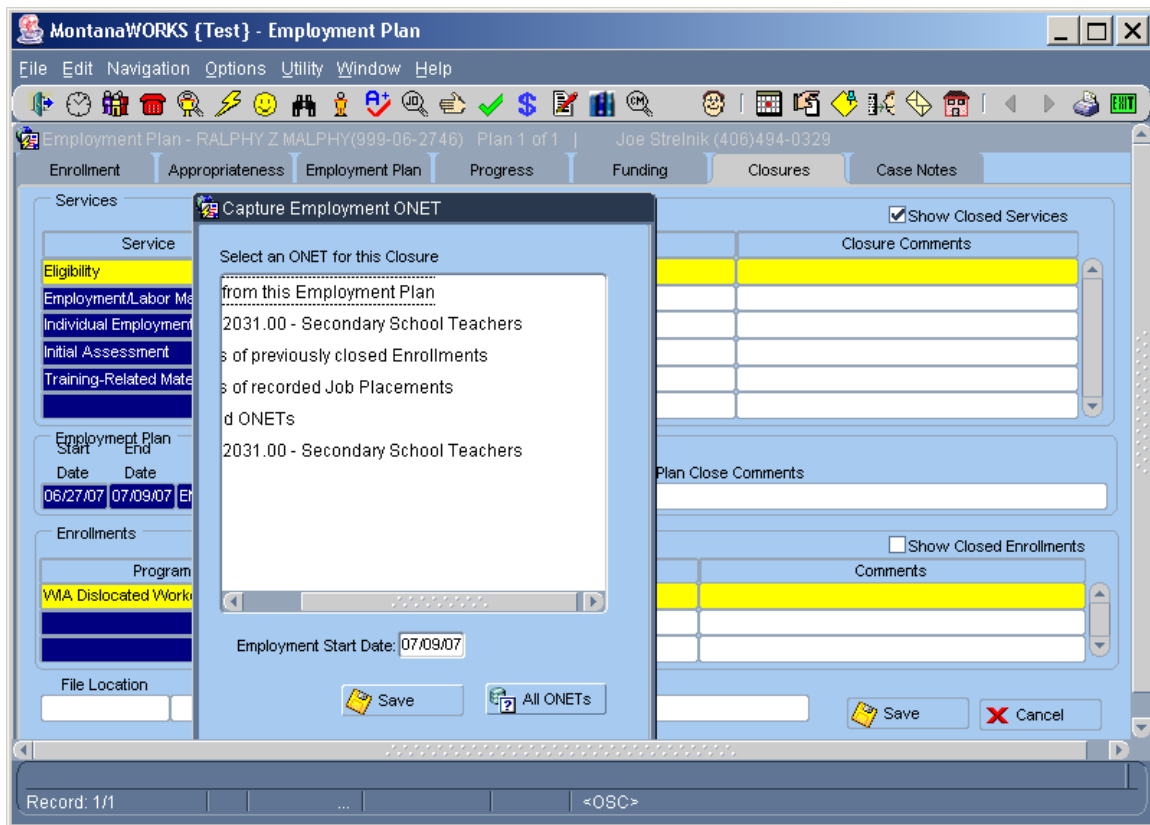
Click on the Options drop down and choose Activate/Inactivate Case Management.

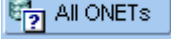
Employment Plan Screen Closure Tab

Closing the Program:

You must also close the Program. Double click in the End date field to select a date and then the Outcome.

If you select "Obtained Employment" as an outcome, the system will ask you for the O*Net code.



Select the O*Net Code or click  to select a new one.

You will get the following pop-up screen when you choose an outcome of Entered Employment.

Employment Plan Screen Closure Tab

Close Enrollment:

The last step in closing a participant out of services is to close the Enrollment.

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - MARCUS R SIMONSON(999-06-1448) | Suzanne Ferguson (406)444-4513

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Services ☐ Show Closed Services

Service	Start	End	Outcome	Closure Comments
Assessment Comprehensive	05/10/07			
Childcare	07/09/07			
Eligibility	05/10/07			
ITA Tuition	05/17/07			
Individual Employment Plan Dev	05/10/07			
Initial Assessment	05/10/07			

Employment Plan ☐ Show Closed Enrollments

Start	End	Reason	Plan Close Comments
05/10/07			

Enrollments ☐ Show Closed Enrollments

Program	Start	End	Outcome	Comments
WIA Dislocated Worker	05/10/07			
WIA Adult	05/10/07			

File Location Archive Comments

Save Cancel

Date service completed

Record: 1/? <OSC>

Click in the "End Date" field and select a date and outcome just like closing a service or a plan.

SAVE when you are done.

You can put comments in the "Comments" field if you wish.

Employment Plan Screen Closure Tab

Now, you are ready to enroll your participant into Follow-Up. You have to enter them into it just like a regular program.

Double click in the "Other Potential DLI Programs" and choose the appropriate follow-up.

The screenshot shows the MontanaWORKS (Test) - Employment Plan application window. The title bar indicates the user is Joe Strelnik (406)494-0329. The main window has a menu bar (File, Edit, Navigation, Options, Utility, Window, Help) and a toolbar. The 'Employment Plan' tab is selected, showing a list of tabs: Enrollment, Appropriateness, Employment Plan, Progress, Funding, Closures, and Case Notes. The 'Employment Plan' tab is active, displaying a form for 'Possible Enrollments' and 'Eligible Enrollments'. The 'Possible Enrollments' section has a table with columns: Program, Date, Close Dt, and Comments/Outcome. The 'Eligible Enrollments' section has a table with columns: Program, Start Dt, End Dt, and Outcome. The 'Other Potential DLI Programs' section is highlighted with a red arrow. The 'Actual Enrollments' section has a table with columns: Program, Start Dt, End Dt, and Outcome. The 'Verify Date' is 06/27/07. The 'Enroll' button is visible. The 'Providers' section is at the bottom. The status bar shows 'Record: 1/1' and '<OSC>'.

Program	Date	Close Dt	Comments/Outcome

Program	Start Dt	End Dt	Outcome

All Youth participants and any Adult/Dislocated Worker participants who entered unsubsidized employment must be enrolled in follow-up.

Employment Plan Screen

Closure Tab

MontanaWORKS [Test] - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - RALPHY Z MALPHY(999-06-2746) | Joe Strelnik (406)494-0329

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

Possible Enrollments

Program	Date	Close Dt	Comments/Outcome

+ Add
- Delete
☐ Show Closed

Eligible Enrollments

MontanaWorks Eligibility

☐ WMA Dislocated Worker

Other Potential DLI Programs

☒ WMA Dislocated Worker Follow Up

+ Add
- Delete

Verify Date: 06/27/07

Enroll Agreement

Actual Enrollments

Program	Start Dt	End Dt	Outcome

Oops!
☐ Show Closed

☐ External Staff Providers Save Cancel

Click to check
Record: 1/1 <OSC>

After you have selected the appropriate follow-up program, click the checkbox to the left of it and then the **Enroll** button.

SAVE when you are done.

Now, you need to create a new plan for the follow-up. Navigate to the "Employment Plan" tab.

Employment Plan Screen Closure Tab

MontanaWORKS {Test} - Employment Plan

File Edit Navigation Options Utility Window Help

Employment Plan - RALPHY Z MALPHY(999-06-2746) | Joe Strelnik (406)494-0329

Enrollment Appropriateness Employment Plan Progress Funding Closures Case Notes

☐ Show Closed Services ☐ Show Closed Tasks EO Notice: Plan: 2 of 2

Start Date: 07/09/07 Closed: ONet: Goal: Justification: LMI

Objective: Start Date: 07/09/07 \$ Authorize


Service: Hours: + Add Task - Del Task - Del Service

End Date: Outcome: Comments:

Schedule Print Plan + New Plan - Del Plan Save Cancel

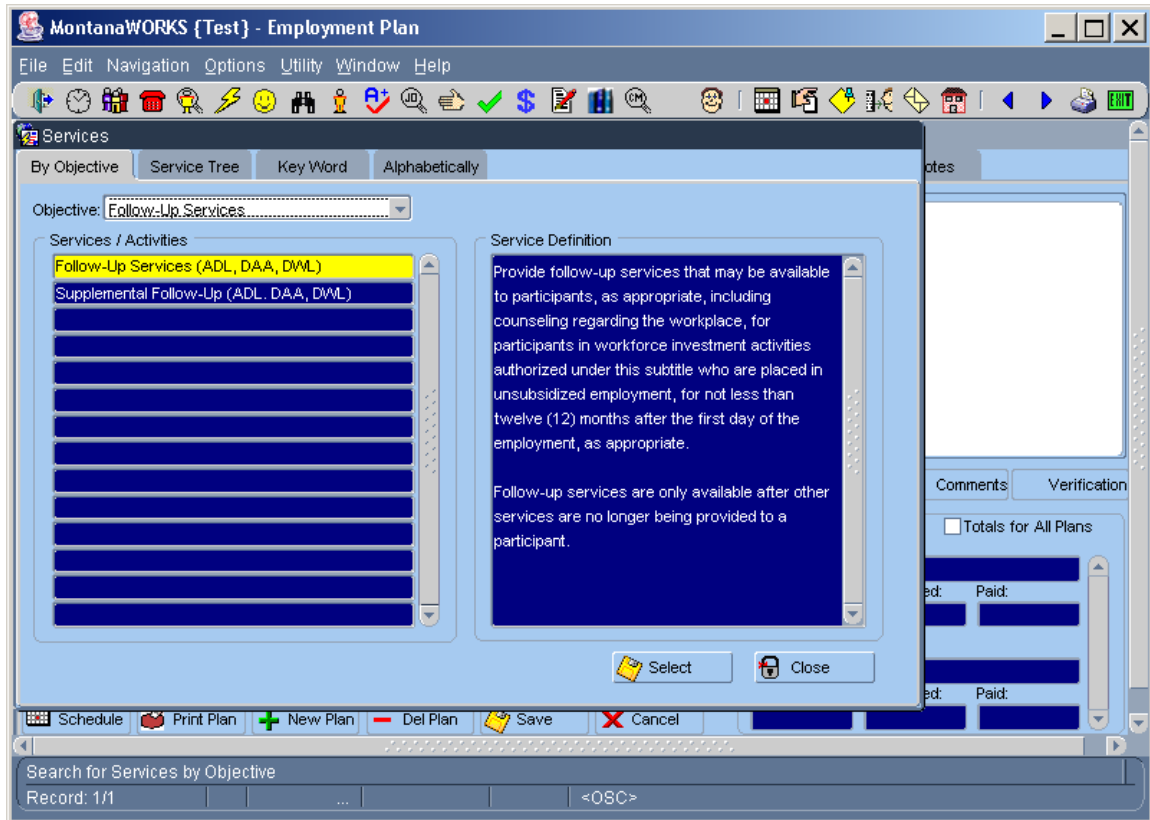
Occupational Information Network - 0*NET

Record: 2/2 ... List of Valu... <OSC>

Click on the  button to get the new plan. The closed plan will be displayed but everything will be dark blue and you will not be able to update the old plan.

Next, you will need to add a service (Follow-up) to the new plan. Double click in the Objective field and choose "Follow-Up Services" as the objective.

Employment Plan Screen Closure Tab



Choose the appropriate follow-up service. (Both follow-up services need to be added!)

If you need to provide services to the participant while they are in follow-up, you will also need to add the service that applies. Just like you did when they were active participants.

When you are done with 4 quarters of follow-up, you will need close them out of the follow-up service (and any other service), the plan, and the program.